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## Contact Center Overview

A contact center is a facility that conducts transactions with people remotely over the telephone or the Internet. These facilities are unique environments that combine the management of people providing customer services with the technologies of telephony, interactive voice response (IVR), email, and database/transaction processing. Contact centers which operate exclusively over the telephone network have traditionally been referred to as "call centers." Although the ClientCall ACD is primarily telephone-centric, this document uses the more generic term contact center. This section provides an overview of contact center operations and establishes a basic set of contact center terminology.

The types of transactions performed by a contact center vary widely depending on the needs of the organization that operates it. Some examples include information/literature requests, catalog sales, product support, payments of taxes and fees (such as traffic citations), and telemarketing. Transactions may be completely automated, i.e., no call center agent or operator is involved, or they may require some degree of agent involvement. Contact centers may perform a single function, such as catalog sales, or may be responsible for many functions, such as multiple telemarketing campaigns that change daily. They may be a functional part of a company or may operate as a service bureau.

Contact centers may be classified as *inbound* (responding to incoming contact requests), *outbound* (initiating contact requests), or *inbound/outbound*. Typically, the people being contacted are members of the public and access the contact center using toll-free telephone service or the public Internet.

Traditionally, contact centers were implemented with technology from multiple vendors that operated independently. For example, an ACD might send calls to agents during business hours or an IVR/Voicemail system after hours. The agents would ask the customer for an account number and use a desktop terminal to access the customer's account information. Because there was no integration between the telephone and computer systems, the caller would have to reenter account information each time if the call moved from the IVR system to an agent to a supervising agent.

Today, contact centers utilize computer-telephony integration (CTI) to link the various call center technologies. The degree of CTI implementation can range from simple capture of an account number by an IVR system to full integration. ClientCall eCenter utilizes InfoLock™, a set of fully integrated CTI features, that retain the context and history of the caller. For example, a caller that needs help in completing an automated payment transaction can talk to an operator who might update the caller's account and then send the caller back into the automated payment system at the exact point needed to complete the transaction.

## Contact Center Terminology

Contact center terminology was established by a variety of vendors and center operators. Like other specialized endeavors, the language of contact centers is neither standard nor consistent. The terms presented in this section are common to many contact centers and will be used throughout this document. Your contact center may use different terminology.

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This document uses the term *client* to refer to the remote person connected to the contact center.

**Abandoned Call**

A call where the client hangs up before reaching an agent. Abandoned call statistics are important because they represent lost business. Contact centers try to minimize abandoned calls, minimize cost, and maximize agent productivity: a difficult task.

**ACD**

Automatic Call Distributor. A specialized telephone switching system that distributes incoming and outgoing calls to agents. The features and degree of sophistication ranges from simple to highly complex. ACDs provide detailed reporting on call and agent activity.

**Agent**

The agent is the individual that communicates directly with the client. (Some environments use the term *operator* instead of agent.) Agents can range from entry-level individuals that read automated scripts to highly-skilled product-support specialists.

**Agent Group**

A collection of agents, usually from five to twenty, that work with a supervisor as a team. Not to be confused with a *call group*, an agent group exists to simplify the management of agents as employees. For example, members of an agent group work the same shifts and take

work breaks together.

**Agent State**

The ACD tracks the state of each agent in real-time using its knowledge of the call and signals issued by the agent. Agent signals come from the pushbuttons on the telephone set or, with CTI, the application software user interface.

**ANI**

Automatic Number Identification (pronounced Annie) An optional 800/900 telephone service, provided by the inter-exchange carrier, that transmits the caller's telephone number. The ANI digits arrive before the caller is connected and are usually transmitted by DTMF signaling.

Note that ANI provides the same information as Caller ID, but it cannot be blocked because it is required billing information from the payer of the call.

**Application Software**

Automated contact centers use computers with either PCs or terminals at each agent seat. The software used by the agents is referred to in this document as the application software. It is either custom software written specifically for the contact center or a software product that has been configured for the application.

**Call Assignment**

Call assignment is the process of connecting the call at the head of a queue with the next available agent.

**Call Group**

A call group, sometimes called a *group*, *split* or *gate*, is a set of agents assigned to a specific application. There is usually one call group for each incoming telephone number. (Using an IVR application, the client may select one of several applications or call groups.) Applications may be unrelated, such as catalog sales and literature fulfillment. They may also be related, such as a technical support line that has separate call groups for hardware and software support. The software support

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application might use one call group for first-level screening calls and another group for advanced troubleshooting calls.

**Caller ID**

A service, offered by the LEC, that provides the number and optional name of the caller. Caller ID is implemented as a simplex 212A modem -compatible data stream that occurs in the silent period between the first and second rings. Caller ID blocking is tariffed differently by state.

**CTI**

Computer-Telephony Integration The integration of the contact center's computer system with the telephone system (switch). With CTI, the switch informs the computer what it knows about a call at each change of call state, e.g., call arrival, call assignment, etc. The computer can use the call information to make decisions passed back to the switch, such as which agent should get the call, or to automatically present screens to the agent upon call arrival that contain information about the call or client. (see Screen Pop)

**Centrex**

CENTRAlized EXchange. A service provided by the LEC that uses the central office switch to provide PBX features to businesses. The CO switch acts as many independent PBXs. The customer needs only 2500-type telephone sets. The benefit to the customer is that no CPE capital investment or on-going support is needed. The down-side is that you pay for the service forever.

**CPE**

Customer Premises Equipment. Telco-talk for equipment that the customer installs.

**DNIS**

Dialed Number Identification Service, pronounced Dee-Ness. An optional 800/900 telephone service, provided by an inter-exchange carrier, that transmits the last four to seven digits of the called number. DNIS arrives before the caller is connected. Inbound contact centers use this information to select the automated caller dialog or to route the call to a specific call group.

**Emergency Record** An agent feature that starts recording of the current call. Used when the agent gets a call that is threatening, involves a caller emergency, or is highly unusual.

**Forced Call Group** A call group call assignment method designed to speed-up calls.

Normally, the agent must signal to accept a new call. When a call group is forced, the agent hears a short tone (Zip Tone) and is immediately connected to the client. The supervisor controls call forcing.

**Inbound/Outbound** Describes the direction of call traffic. Some contact centers specialize in only one.

**ISDN**

Integrated Services Digital Network. Telco-talk for an all-digital telephone service. ISDN is an international standard (with a North American variation) created in the 80's. Available as BRI, a single line service (two PCM voice / 64K data channels) and PRI, a 23-channel multi-line.

**IXC**

Inter-eXchange Carrier.. Telco-talk for a long-distance carrier. (A CO is called an exchange, hence inter-exchange) Examples: AT&T, Sprint, MCI Worldcom, and nearly a thousand others.

**Music on Hold**

The audio heard when not connected to another party. Can be provided from a music source (CD, radio, etc.) or a recorded message that repeats, i.e., a studio-produced advertisement with music. ACDs can provide lots of options for announcements and music on hold. For example, different call groups get different music and agents might be able to select their personal choice of music heard during idle periods.

**Night Mode**

A mode of operation when the call group is unstaffed after hours.. Calls can be handled in a variety of ways during night mode.

**Overflow**

When the incoming call load exceeds a threshold, the call group goes into an overflow condition and incoming calls can be directed to the queues of other call groups.

**PBX**

Private Branch eXchange. Telco-talk for a CPE telephone system (switch). The PBX interfaces to trunk circuits from the LEC or IXC. It connects calls to telephone station sets and implements all of the various features common in telephone systems, e.g., transfers, hunt groups, conferencing, etc.

An ACD is often built on a PBX platform because it needs all of the same basic call-handling features of a PBX. The primary difference between the two is that ACDs have call queuing and agent management features. PBXs distribute calls to a hunt group (sometimes called a rotary) using a fixed list of extensions. For example, a customer service hunt group might be set up to send incoming calls to 200, 210, 233, and 213. It will always try 200 first and roll-over to 210 on a busy or no answer. For incoming contact centers, this means that the guy on 200 is always busy and 213 is least busy.

Note: Used to be known as PABX (A for Automatic). Because there don't seem to be many Manual exchanges built these days, PABX terminology is used today only in the UK.

**Predictive Dialing**

Outbound contact center productivity can be significantly increased by off-loading the dialing function from the agents. Early contact centers used autodialers driven by a call-list database while the agent monitored call progress. Predictive dialing takes the agent completely out of the dialing process. It uses statistical techniques where the number of outbound calls being placed in real-time is based on the prediction of how many agents will be available to take the call and the prediction of how many calls will successfully connect to a live body. Predictive dialers wait for answer (the good ones can detect answering

machines) and then quickly connect the agent. The agent hears the “-lo” part of hello and starts talking. The algorithms used for predictive dialing are usually proprietary (or least marketed that way) and are often tuned for each application.

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(Note: Over-aggressive predictive dialers will run out of agents to match up with callers and must drop the call. This accounts for many of the hang-up calls you receive at home during prime time.

**Queue**

ACDs manage call distribution through the extensive use of queues. For inbound contact centers, calls arrive and are routed to a particular call group queue on a first-in/first-out basis. The call group queues are served by agent queues, i.e., agents waiting for calls. Outbound contact centers have agent queues, dial queues, and connected call queues.

**Queue Escape**

A feature that allows callers in queue waiting for agents to get out of the queue and perform some other task. The other task is usually an automated task (IVR) that does not require the assistance of an agent. The caller can sometimes return back to the queue at the same relative position in line.

**Queue Status**

Call queue status is determined by the number of callers waiting in queue and thresholds established by the contact center.

**Real-time Stats**

Contact center supervisors closely monitor a small set of statistics that measure contact center performance and incoming traffic. The ACD provides displays of these stats in real-time on terminals or large display signs visible to the agents. Examples of real-time stats include callers-in-queue, queue wait time, oldest call wait time, and queue state. Advanced ACDs present real-time stats in graphical format.

**Routing**

The process of directing an incoming call to a specific call group. The routing logic can make decisions based on time-of-day, the called number (DNIS), and caller-entered data (such an account number or language preference ).

**Screen Pop**

A technique, common with CTI, where the client is identified before speaking to an agent allowing the caller's database record to ‘pop’ up

on the agent's screen as the call arrives. Client identification is either automatic, using ANI, or manual using IVR to gather an account or other number from the client. Screen pop reduces call time by 10 to 20 sec.

#### **Seat (Position)**

This is the physical location where an agent works. It is used by the ACD to refer to a specific telephone set and terminal. Agents log in when they arrive at their seat so that the ACD can associate the seat with the agent.

#### **Steps**

ACDs can be programmed to control the series of events, known as *steps*, which occur while a client is in queue. For example, a series of audio messages may be played based on time in queue. Each call group has a different set of steps. Advanced ACDs have a scripting language for step programming.

#### **Supervisor**

The manager of an agent group. The supervisor has ACD features to monitor agent calls (silently or with a warning beep to the agent), conference with an agent, take calls escalated by an agent, and take incoming calls (only under peak loading). Supervisors frequently monitor agent group performance using the ACD's real-time stats.

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#### **Trunk Group**

ACDs manage a variety of inbound/outbound trunks. Trunks are assigned to trunk groups that have a common routing characteristics.

#### **UCD**

(Universal Call Distributor) A class of inbound call distributor that distributes calls uniformly to agents, but has fewer features, (reports, statistics, call routing options, caller announcements, etc.) than an ACD. Considered to be a dumb ACD, the UCD is usually found as a feature of PBXs.

#### **Wrap-up**

Some contact center applications require that the agents perform wrap-up activities, such as entering notes about the call, after the call completes. The ACD does not send new calls to an agent that is performing wrap-up.

#### **Zip Tone**

The audio heard in the agent's headset when a call arrives at the position. (Agents typically use headsets and operate their sets off-hook.) Zip tone may be distinctive, i.e., different depending on the source of the call, and may be a tone or a digitized voice

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